



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

ESTATE ASSISTANT

Class No. 005604

■ CLASSIFICATION PURPOSE

Under general supervision to assist Deputy Public Administrator/Guardians in carrying out assigned duties in the investigation and administration of conservatorship and decedent estates; and to perform related work.

■ DISTINGUISHING CHARACTERISTICS

Estate Assistant is a clerical specialist class found only in the Decedent/Conservatorship Division of the Public Administrator/Guardian office. Estate Assistant is distinguished from Deputy Public Administrator-Guardians in that the latter is a case manager responsible for the investigation of estates, the assessment of needs, and the provision of financial, personal or administrative services to conservatees or the estates of deceased persons.

■ FUNCTIONS

The examples of functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.

Essential Functions:

1. Initiates requests for establishing and making withdrawals from bank accounts
2. Serves citations.
3. Visits and shops for conservatees.
4. Acts as witness in residence searches.
5. Investigates personal papers for assets.
6. Obtains documents such as birth and death certificates and physician declarations.
7. Investigates heirship/genealogy matters.
8. Inputs and retrieves information from computerized database in connection with preparing reports and letters and updating case files.
9. Prepares detailed listing of assets to accompany inventory.
10. Picks up personal property items from hospitals and nursing homes.
11. Transports conservatees to doctor/dental appointments.
12. Performs minor legal procedures and administrative details for deputies.
13. Searches for information contained in case files to verify assets and property owned by conservatees/decedents.
14. Provides responsive, high quality service to County employees, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Legal terminology, forms, and documents used in estate administration and conservatorship proceedings.
- Modern office practices and procedures.
- Record keeping and filing systems.
- County customer service objectives and strategies.

Skills and Abilities to:

- Understand and communicate comprehensive instructions, reports, and regulations pertaining to estate administration and conservatorship proceedings.
- Understand the order of events in conservatorship and probate procedures insuring that essential procedural requirements are met.
- Understand, interpret and apply rules and regulations of various assistance programs.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in situations that require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.
- Take direction from multiple sources and prioritize multiple tasks.
- Operate and use computer.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. An example of qualifying education/experience is: at least four (4) years of clerical experience, two (2) years of which must have been in a specialized capacity involving extensive public contact, or in the office of the Public Administrator. Experience inputting and retrieving information from a computerized system is highly desirable.

Note: Completion of appropriate course work from an accredited college or university may substitute for the experience requirement on a year-for-year basis

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Continuous: upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers, and lifting and carrying objects weighting up to 50 pounds. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level, lifting and carrying objects weighing up to 50 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

Certification/Registration

None Required.

Working Conditions

Incumbents may be exposed to communicable diseases, rodents, and unpleasant odors, and use physical strength and agility on a continual basis, and are exposed to computer screens.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of six (6) months (Civil Service Rule 4.2.5).

New: April 9, 1990
Revised: June 1, 1990
Revised: March 11, 2002
Revised: November 20, 2002
Revised: Spring 2003
Revised: June 11, 2004

Estate Assistant (Class No. 005604)

Union Code: PS

Variable Entry: Y